Virtual Agent Case Study
(Financial Services Organisation)

Customer Overview

The customer is a leading international savings and investments organisation. With roots stretching back over a century, the organisation is highly reputable for finding innovative solutions and catering to clients whose needs are constantly evolving. Today, it encompasses a huge range of varying solutions in several sectors and boasts a diverse customer history in industries from all over the globe.

The Challenge

- The service desk was still in transition to a third party and were therefore not fully enabled and working seamlessly yet.

- The global pandemic resulted in reduced staffing levels and caused unforeseen and additional service desk interactions.

- Standard support hours were no longer the norm as a result of the global pandemic.

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As you can imagine, all service desks naturally receive a vast number of calls and emails. The majority of cases received can be resolved quickly, without needing access to a real-time agent. The financial services organisation found that valuable time was being spent responding to basic queries that could be resolved by using carefully curated knowledge articles for frequently asked questions, and the answer could almost always be found through self-service. Freeing up agents' time would help them resolve complex queries requiring meaningful communication much faster, and this was what the customer hoped to achieve.

Not only were the agents stretched from a large number of queries, but the side-effects of the pandemic forced many organisations to operate at reduced capacity. This led to their set-up inevitably becoming more fragmented. The organisation also had the added complication that their service desk had recently been outsourced to a third party, and the knowledge transfer process was still not fully completed. On top of this, the organisation had embarked on a shift-left programme which was looking to transfer more responsibility to the service desk as a whole; therefore, self-service was critical to ensure that any additional demand could be effectively off-set.

The impact of COVID-19 on top of the company's existing challenges created a fantastic opportunity to introduce a virtual chatbot to support their employees and encourage self-service (at any time, and from any device). This allowed the staff flexibility to support themselves when they needed an answer, as well as reducing the number of interactions with what was now a limited number of agents.

The Solution

The customer had introduced ServiceNow ITSM into their business almost four years ago, meaning their processes were mature and they had a well-established employee self-service portal with existing basic chat support. Having upgraded their subscription to ITSM Professional for the additional features, they wanted to leverage the more advanced chat functionality that this brought by not only introducing Virtual Agent, but also utilising Natural Language Understanding (NLU) in addition. An extra incentive to use ServiceNow manifested from the seamless integration of Virtual Agent into Microsoft Teams - this would enable an enriched chat functionality within their existing Instant Messaging tooling.

With ServiceNow being a strategic platform within the enterprise, it was easy to identify Virtual Agent as a quick-win solution: it would not only allow them to address some of their existing service desk pain points but would also allow the internal ServiceNow Team Lead to drive value from the existing investment in ServiceNow. The implementation would support the service desk's efficiencies while increasing support to drive employee self-service through automation and workflows.

One of the biggest contributors to the success of this project was that the customer and the team involved having carried out extensive research into the type of conversations they would look to automate via Virtual Agent. This enabled the Unifii team to focus on delivering the technology, as the in-depth analysis had already taken place. Identifying opportunities to reduce the number of tickets being raised and where the business could allow employees to self-serve was critical to project success. Stakeholder and business buy-in was essential, due to the changes in engagement with the service desk as well as the move to remote working for the majority of employees, the project team had to ensure buy-in early on as well as maintain the correct level of communication throughout the transition.

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The working relationship between the customer and Unifii was the foundation to the overall success of the project. Two of Unifii's implementation team members had previously worked as an extension of the internal ServiceNow BAU team for the customer – this meant that they were not only familiar with how ServiceNow should operate correctly, but they also had first-hand experience of being an end-user within the business. This allowed them to advise appropriately throughout the project by citing their own experiences.

The Benefits

The solution allowed the organisation to alleviate recent, extraneous business challenges into a working solution, thus gaining stakeholder buy-in during an unprecedented year for organisations. They were able to complete this project successfully during this period.

"We managed to alleviate recent, extraneous business challenges into a working solution, thus gaining stakeholder buy-in during an unprecedented year for organisations."

- Person-to-person support chats were successfully reduced by 85%.

- They were able to maintain incident volumes to the Service Desk at pre-COVID-19 levels, despite going live during lockdown, which increased demand for remote working support by approx. 20%

- They reduced their Request fulfilment tasks to the service desk by 25% by helping employees find and select the appropriate service offering, therefore ensuring the tickets landed with the right team first time.

- Through the introduction of Virtual Agent, the organisation can now measure 100% of all feedback via the tool and using that information to iteratively develop new and better levels of support.

We believe that this project is a great example of client, partner and vendor working as one to achieve business goals and create efficiencies, whilst enabling their customers to gain more value from their investment in ServiceNow.